

Sample Result Packets™

Examples for Sales Representative, Operations Manager, and Field Technician roles.

Sales Representative

Role Title	Sales Representative
Primary Outcome(s)	<ul style="list-style-type: none">- Meet or exceed monthly revenue targets- Move qualified leads through the pipeline
Core Responsibilities	<ul style="list-style-type: none">- Conduct sales calls and demos- Manage CRM pipeline and follow-up- Prepare and deliver proposals
Success Signals (Key Metrics)	<ul style="list-style-type: none">- Monthly revenue vs quota- # of qualified leads contacted- Pipeline velocity
Focus Behaviors (Habits & Mindset)	<ul style="list-style-type: none">- Uses time blocks for outreach- Consistent follow-up behavior- Focused daily start with top 3 priorities
Time & Focus Rhythm (Daily/Weekly)	<ul style="list-style-type: none">- AM: Outreach block- Midday: Client follow-up reset- EOD: Pipeline review and prep

Operations Manager

Role Title	Operations Manager
Primary Outcome(s)	<ul style="list-style-type: none">- Improve operational efficiency- Ensure daily workflow execution- Support team productivity
Core Responsibilities	<ul style="list-style-type: none">- Monitor workflows and schedules- Solve bottlenecks in real time- Communicate priorities and lead huddles
Success Signals (Key Metrics)	<ul style="list-style-type: none">- Downtime hours reduced- On-time task completion- Employee productivity or throughput
Focus Behaviors (Habits & Mindset)	<ul style="list-style-type: none">- Clarity in delegation- Calm under pressure- Weekly reflection and improvement mindset
Time & Focus Rhythm (Daily/Weekly)	<ul style="list-style-type: none">- AM: Daily huddle and assignment- Midday: Walkthrough/reset with team- PM: Metric review and task wrap

Field Technician

Role Title	Field Technician
Primary Outcome(s)	<ul style="list-style-type: none">- Complete assigned jobs on time with quality- Ensure customer satisfaction- Maintain accurate reporting
Core Responsibilities	<ul style="list-style-type: none">- Arrive prepared for each job- Perform service or install- Document results and client feedback
Success Signals (Key Metrics)	<ul style="list-style-type: none">- First-time fix rate- Job completion rate- Client satisfaction scores
Focus Behaviors (Habits & Mindset)	<ul style="list-style-type: none">- Prepared and focused start- Safe and efficient practices- Brief reset after each job to stay sharp
Time & Focus Rhythm (Daily/Weekly)	<ul style="list-style-type: none">- Pre-day setup- Midday break/reset- EOD job reporting and tool check